User Documentation V 4.0

Introduction

The DOIT Customer Service Center supervises the on-line publication of the State of Illinois Telephone Directory (SOI Directory) which is a central source for contacting all entitles of Illinois state government, and is the sole data source used by the State's Directory Assistance Operators. The SOI Directory contains business listings and alphabetical staff listings for state agencies, boards, commissions, and universities. The on-line State Directory is used by private citizens, state, local and federal government employees, as well as private sector institutions and businesses.

The SOI Directory is available on the State's home page at www.illinois.gov. Click on Government – click on State Phone Directory. Users can search by agency Business Listings or perform advanced searches to alphabetically locate state employees by name. Printable pdf versions of selected agency Business Listings and Employee Listings are also available.

The importance of maintaining correct and current listings cannot be overstated. This manual is published to help appointed Telecommunications Coordinators with the ongoing task. The SOI Directory Application is specially designed for the State of Illinois. It is remarkably easy to learn, user friendly in all phases of operation, and secure.

I. Getting Started

A. Telecommunications Coordinator Appointment

There are two types of Telecommunications Coordinators:

a. **Primary** - has spending authority, can sign service orders, authorize billable repairs and password resets, and receives informational Bulletins.

b. **Secondary** – has NO spending authority, can NOT sign service orders nor authorize billable repairs, can authorize password resets, and receives informational Bulletins.

Both Primary and Secondary Coordinators may be authorized to update the SOI Directory.

Each agency, board, commission, and/or university establishes its own publication policy. They determine which staff may (or may not) have their contact information published in the SOI Directory. They also appoint the Coordinator responsible for maintaining the SOI Directory listings and controlling the agency's published information. The Coordinator must be appointed in writing by the agency head (an agency's Director, a commission's Executive Director, elected Constitutional Officer, university Chancellor, etc.). The form required for Coordinator appointment is available on the administrative home page of the SOI Directory Application and is also available on the Bureau of Communications and Computer Services (DOIT) web site at www.DoIT.illinois.gov. When completed, the form should be mailed to:

>   DOIT Customer Service Center
>   120 West Jefferson – 2nd Floor
>   Springfield, IL 62702

B. System Requirements

To gain access to the Application, users must have the following system requirements:

- A computer with Internet connection.
- Most up-to-date version of Internet Explorer.
- Popup blocker disabled. (You may need to engage your IT Manager or contact your IT Help Desk for assistance.)

Please contact DOIT Web Services at DoIT.webservices@illinois.gov for any issues related to system requirements. Other contact information for problem resolution is located in Section VIII.

C. Obtain a Public Account

The Application runs under DOIT Application Manager. Coordinators will be permitted administrative rights to add, change, and delete directory listings. They must have a Public Account to use the Application.

If you already have a Public Account, skip to **Section E Log In.**

If you do not have a Public Account, follow the steps below to register for the Telephone application. The process takes just a minute, and you will have instant, secure on-line access to the application.

Create a SOI Public Account

1. From an Internet browser, access: **https://DoITpublic.illinois.gov/telephone**.
The "State of Illinois Public Account Portal" will appear on screen.

2. Click on **"Don't have an Illinois Public Account?"** button. The **"Create a New Account"** portal webpage will appear on screen.

3. Input your "**First Name**"
4. Input your "**Last Name**"
5. Input your "**Email Address**" *(business or personal email accepted)*
6. Input and "**Confirm Email Address**"
7. Input/create your **"Username"** in accordance with the criteria below:

Username Criteria

Must be between 6 and 20 characters in length
May contain letters, numbers and periods
Should not start or end with a period

8. Input/Create a password in accordance with the State of Illinois
Password Complexity Requirements listed below:

Password Criteria
(ensure caps lock is deactivated, passwords are case sensitive)
- Minimum password length is 8 characters
- Password may not contain your Public Login Account, First Name, or Last Name
- Password cannot have been previously used
- Password must contain characters from three of the following categories:
    ◦ English UPPERCASE characters *(e.g. A through Z)*
    ◦ English lowercase characters *(e.g. a through z)*
    ◦ Base 10 numbers *(e.g. 0 through 9)*
    ◦ Non-alphabetic characters (*e.g. !, @, #, $, &*)

Tips for Strong Passwords
- Passwords are case sensitive, use a combination of uppercase and lowercase letters
- Use a mixture of letters, numbers, and special characters (*e.g. P@$$WORD*)
- Use supported non-alphabetic characters (*e.g. !, @, #, $, &*)
- For a strong and easy to remember password, create a personal acronym

- Use a different password than your other online accounts

9. Input "**Password"**
10. Input and "**Confirm Password"**
11. Click on the "**Register"** Button

A **Confirmation Email** will be sent to your Email Address that you provided during the Illinois Public Account registration process. To complete the registration process, you will need to confirm your account by clicking on the link in the email. If you do not receive the confirmation email, check your Spam and Bulk Mail folders. It's possible that the email confirmation was tagged as spam by your email spam and bulk mail filter.

NOTE: The State of Illinois Public Domain includes a self-service password reset solution which allows employees the capability to reset their account password remotely if ever forgotten. Passwords for State of Illinois Public Accounts will expire every 364 days. If you forget your Public Account or Password, link to the State of Illinois **Public Domain**, click on the **Can't Access Your Account?** and follow the instructions on screen.

E. Log In

1. Open an Internet Browser.
2. Type https://DoITpublic.illinois.gov/telephone in the address line.
3. Click "Go."
4. The "State of Illinois Public Account Portal" will appear on screen:

5. Enter Username and Password.

   Note: If you have not previously used any DOIT web applications, you will be transferred to the Registration screen.

E. Log In

F. To access Telephone application:

1. From Internet browser, access: **https://DoITpublic.illinois.gov/telephone** and the State of Illinois Public Account Portal will appear on screen.

2. Input your "**Illinois Public Account**".
3. Input your "**Illinois Public Account Password**".
4. **"Remember Me"** check box.
   If using a private computer, this option retains your user Account for future Telephone access.
   This option is **NOT RECOMMENDED** if you use a public workstation that is shared by multiple users.
5. Click the "Sign In" button to access Telephone.
6. Complete the one-time "**State of Illinois Employee eRegistration"** when prompted. You will only need to complete this step the first time you access the system. **State of Illinois eRegistration**

7. Input your **"Email Address"**. *(business or personal email accepted)*
8. Input and **"Confirm Email Address"**.
9. **Optional Field** - From menu select a "**Prefix**".
10. Input your **"First Name"**.
11. **Optional Field** - Input your **"Middle Name"**.
12. Input your **"Last Name"**.
13. **Optional Field** - From menu select "**Suffix**".
14. Input your primary **"Phone Number"**. *(mobile, home, or work are acceptable)*
15. Input your **"Birthdate".** *(mm/dd/yyyy)*
16. Input/create a four-digit **Personal Identification Number "PIN"**. *(the PIN protects your privacy and prevents unauthorized access to your account)*
17. Input and **"Confirm PIN"**
18. Input your **"Social Security Number"** or **"Employee ID"**. *(if you do not know your Employee ID, contact your agency appointed Payroll Administrator)*
19. Click on the "Proceed with Registration" button and the eRegistration page will appear on screen requesting verification of your personal information.
20. Click on "Proceed with Registration".

F. **How to log off from Telephone:**
1. Click on the "**Log Off"** menu selection located on the right hand side of th top navigation menu.
2. Click on the "**Close Window Button"** to close the browser window.
3. Forgetting to log off poses *a security risk* with any computer that is accessible to other people and could potentially leave your State of Illinois Public Account open to abuse. To avoid misuse by others, remember to log off of or lock your computer whenever you leave it.

II. Work Unit and Address Maintenance

Coordinators create and maintain drop-down menus of agency Work Units and Addresses. It is important to maintain these two areas of the SOI Directory since most other functions relate to this information.   Coordinators can **add**, **edit**, and **delete** Work Units and Addresses. Work Unit and Address screens identify edit dates and the individuals who last edited the records.

A. Add Work Unit

"Work Units" were created from data entered in the "Responsibility" field of MONIES records. When new Work Units are added, their names should be carefully considered. Abbreviations and acronyms may be understood by internal agency personnel, but outside users and State DA Operators may not understand the terminology or recognize what service or business function is performed by the group.

1. Click "Work Units" link on the Telecom Coordinator menu:
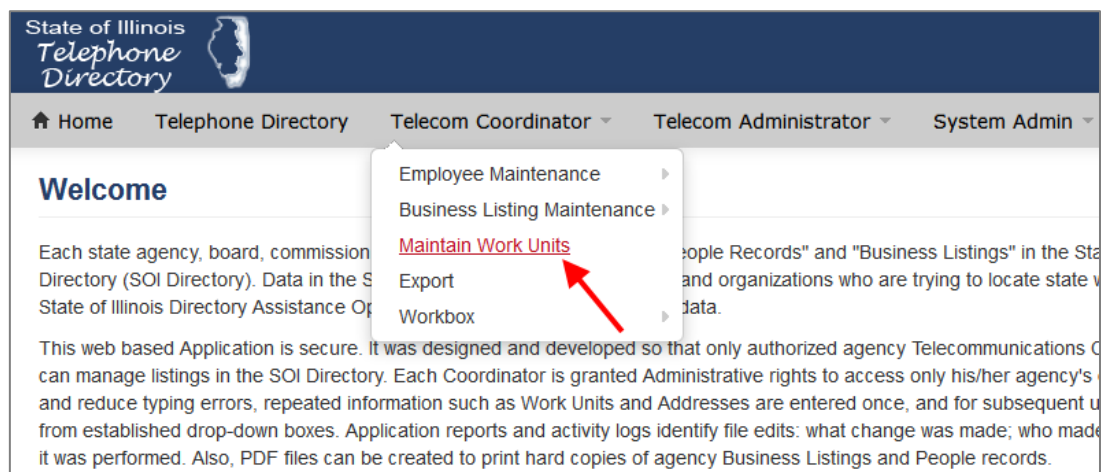
2. The following screen will appear:
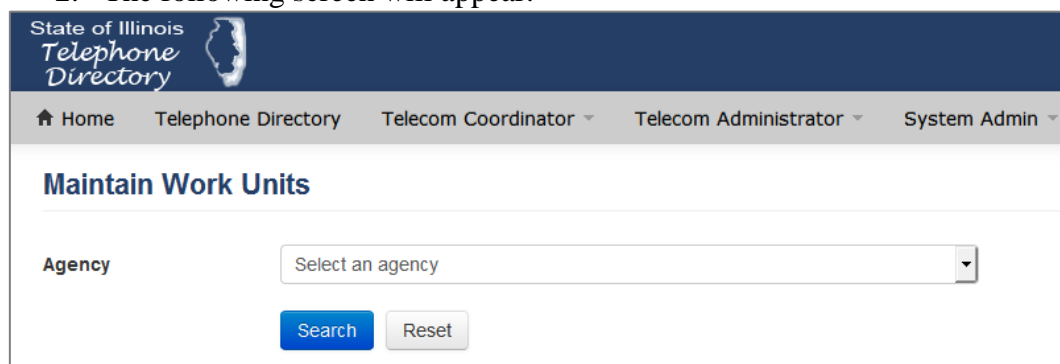
3. Choose an agency from the dropdown list and then click "Search" button. The following screen will appear:

4. Click "Create Work Unit" link. The following pop-up will appear:

5. Enter Work Unit Name and Click "Save" button. The following Screen will appear confirming the addition of new Work Unit:
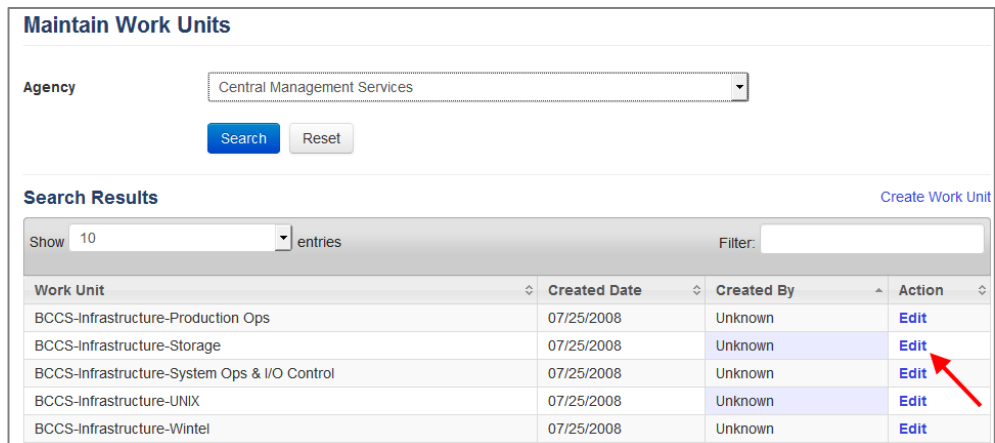
B. Edit Work Unit

1. Click "Edit" link on right side of the page.
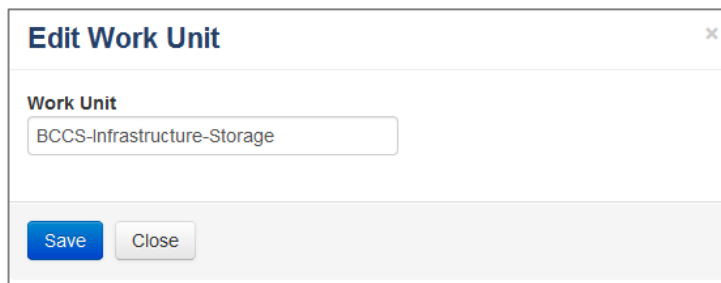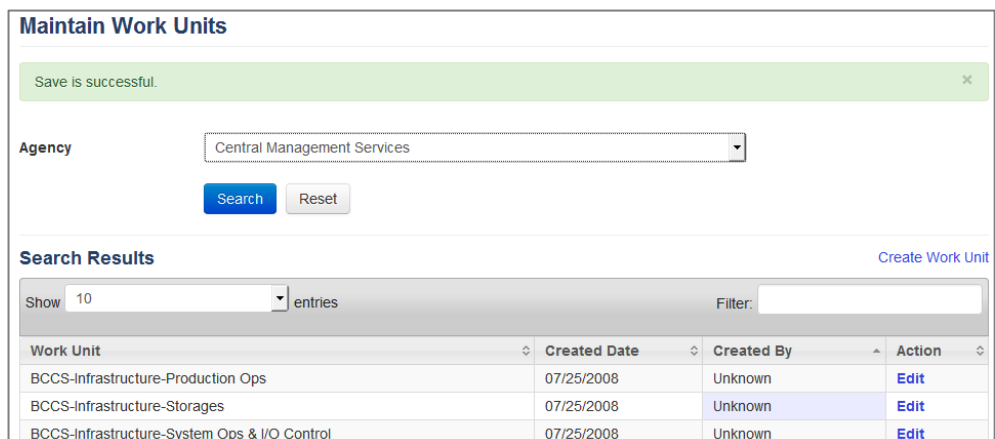

2. The following pop-up will appear:

3. Make change(s) to the Work Unit Name and Click "Save" button. The following screen will appear confirming the change applied:

C. Delete Work Unit

1. Click "Delete" link on right side of the page.

Note: The delete link is not shown if there are People in the selected Work Unit. A Work Unit cannot be deleted until People Records are removed.

2. The following pop-up will appear:

Click on "Ok" button to delete the Work Unit.

3. The following screen will appear confirming the deletion:

G. Move People Listing

This function is used to relocate or move a group of People Listings from one Address to another.

1. Click "Address" link on left side of the page.

2. The following screen will appear:

3. Enter at least one search criteria and click "Search" button. The following screen will appear with the Search Results:

4. Click the checkbox(es) of the Address(es) from which you want to move listings. Both the "New Address" field and "Move" button will be enabled. Selecting the checkbox in the "Select" column header will select/deselect all of the items on the list:

5. Type in a "New Address" (the new location) from the autocomplete list.
    Note: The New Address must already be in the system. If it is not, enter it as a new Address -- see **Adding Address, Section II. D**.
6. Check the People Record(s) to be relocated "FROM" the current Address "TO" the new Address. Check the individual records/listings that should move.
7. Click "Move" button. The following pop-up will appear to confirm the move to the new location:

Please confirm moving the selected items to this new address:
300 W Main STE 500 Belleville

Cancel   **OK**

9. Click "OK" button to complete the address change. The following screen appears to confirm the listings update:

Move People Listing

Save is successful.

Agency	All agencies
Last Name	
First Name	

H. Move Business Listing

This function is used to relocate or move a group of People Records and/or Business Listings from one Address to another. A Global Change can be used to relocate SOME or ALL People Records and Business Listings to the Address you select.

1. Click "Move Business Listing" link on the menu:
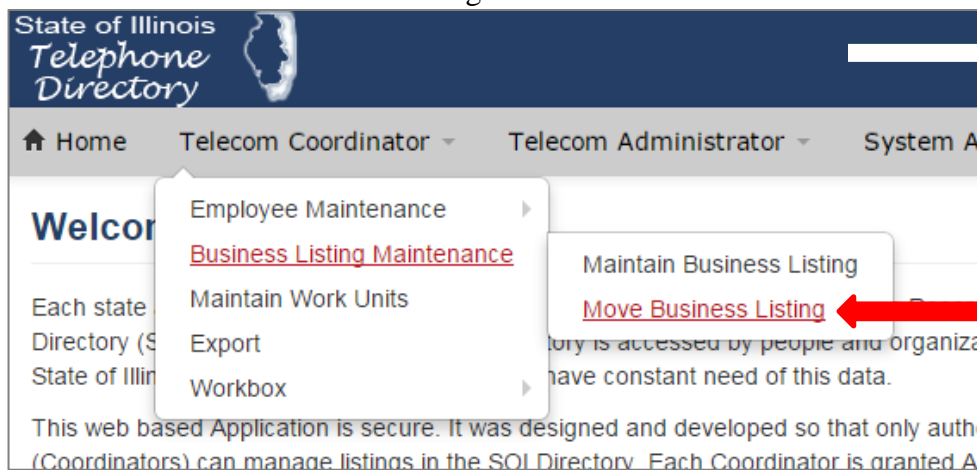
State of Illinois
Telephone Directory

🏠 Home   Telecom Coordinator ▾   Telecom Administrator ▾   System A

Welcol

Employee Maintenance ▶
Business Listing Maintenance   Maintain Business Listing
Maintain Work Units   Move Business Listing ⬅
Export
Workbox ▶

Each state
Directory (S
State of Illin

tory is accessed by people and organiza
have constant need of this data.

This web based Application is secure. It was designed and developed so that only auth
(Coordinators) can manage listings in the SOI Directory. Each Coordinator is granted A

2. The following screen will appear:

3. Enter at least one search criteria and click "Search" button. The following screen will appear with the Search Results:

4. Click the checkbox(es) of the Address(es) from which you want to move listings. Both the "New Address" field and "Move" button will be enabled. Selecting the checkbox in the "Select" column header will select/deselect all of the items on the list:
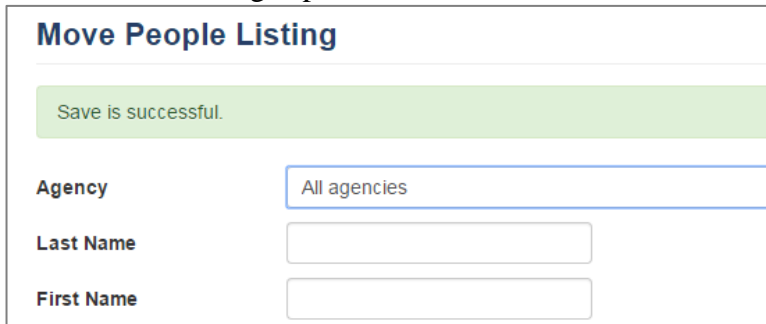
8. Type in a "New Address" (the new location) from the autocomplete list.
   Note: The New Address must already be in the system. If it is not, enter it as a new Address -- see **Adding Address, Section II. D**.
9. Check the Business Listing(s) to be relocated "FROM" the current Address "TO" the new Address. Check the individual records/listings that should move.
10. Click "Move" button. The following pop-up will appear to confirm the move to the new location:

9. Click "OK" button to complete the address change. The following screen appears to confirm the listings update:

III.   People Records

Coordinators may **add**, **edit, activate/deactivate**, and **delete** People Records in the SOI Directory. Records display the entry or last edit date and the Coordinator responsible for the entry/edit.

A "People Record" consists of the following information. ***** Designates required fields for publication in People Records.

> Last Name*
> First Name*
> Middle Name/Initial
> Nick Name
> Designation (Jr., Sr., Col., III, etc.)
> Email Address (if desired)
> Mobile Phone Number (if desired)
> Agency
> Work Unit
> Work Phone*
> Address*

The SOI Directory Application also allows an agency to maintain People Records for eventual publication of its own, internal agency Directory. People Records can be entered and NOT published in the Directory available on the state's home page.

A. Add People

1. Click on the "Maintain Employee" link on the dropdown menu.

2. The following screen will appear:

Maintain Employee

Each agency establishes its own publication policy - i.e. which staff may (or may not) have their contact information published in the SOI Directory. The designated Coordinator controls his/her agency's published information.

Coordinators may Add/Create People records, Edit People Records, Inactivate People Records, and Re-Activate People records. The Application also permits global changes for large groups of staff.

Agency	All agencies
Last Name	
First Name	

[Search] [Reset]

3. Enter the Search Criteria and click the "Search" button. The following screen will appear:

Maintain Employee

Each agency establishes its own publication policy - i.e. which staff may (or may not) have their contact information published in the SOI Directory. The designated Coordinator controls his/her agency's published information.

Coordinators may Add/Create People records, Edit People Records, Inactivate People Records, and Re-Activate People records. The Application also permits global changes for large groups of staff.

Agency	All agencies
Last Name	e
First Name	h

[Search] [Reset]

Search Results   Create Employee

Show 10 entries   Filter:

Employee Name	Agency	Work Unit	Status	Action
Ellison, Harlan	Human Services	Rehab Springfield Field Office	Active	Edit | Delete
Everett, Harry	Emergency Management Agency	Radiochemistry	Inactive	Edit | Delete
Everett, Mary	Criminal Justice Information Authority	Executive Director	Active	Edit | Delete
Ellison, Larry	Emergency Management Agency	Radiochemistry	Inactive	Edit | Delete
Eagle, Jane	Healthcare and Family Services	Division of Child Support Services	Active	Edit | Delete
Eager, Dave	Transportation	Mat'l & Phy Res	Active	Edit | Delete
Enager, Dave	Transportation	Matl & Phys Research	Active	Edit | Delete
Engle, Oliver	State Lottery	Fiscal Operations	Active	Edit | Delete
Ensign, Slade	Gaming Board	Illinois Gaming Board	Active	Edit | Delete
Esstein, Kenshin	Human Services	F&CS Kane County Benefits Office	Active	Edit | Delete

Showing 1 to 10 of 12 entries   First Previous 1 2 Next Last

4. Click the "Create Employee" button. The following screen will appear:

People records contain two sections:

Personal Information - Identifies the name, preferred name, suffix, agency, and work unit information specific to this employee.

Work Phone and Address - Identifies contact information for the employee and whether or not listings should be published.

4. Enter Personal Information:
   - First Name and Last Name are required fields.
   - Upper and/or lower case can be used.
   - Select Work Unit from the drop-down box.
   - Enter e-mail if desired and check box **only** if it should be published.
   - Enter Cell Phone number and check box **only** if it should be published.

   If person IS NOT to be included in People Listings, but will be referenced as part of a Business Listing, click "Save" button. (The Work Phone and Address for the Business listing are entered on a separate screen.)

5. Enter Work Phone(s) and Address(es):

   If "person" IS to be included in the People Listings, the Work Phone and Address are required.
   - Enter Work Phone (10 digit number = XXXXXXXXXX). If the work phone is from a foreign country, click ⊞ and select the country.
   - Enter extension number.
   - Select Address from drop-down menu.

6. System default checks the box to publish the People Record. To avoid publication, the "Publish" box must be un-checked.

7. Click "Save" button. The following screen will appear to confirm the saved People Record:

Edit Employee

Back to List

Save is successful.   ×

Last Name *	Wayne
First Name *	John
Middle Name	
Preferred Name	
Suffix	
Working Title	
Agency *	Central Management Services ▼
Work Unit *	BCCS-Enterprise Applications-Applications ▼ Create Work Unit
Active	● Yes ○ No
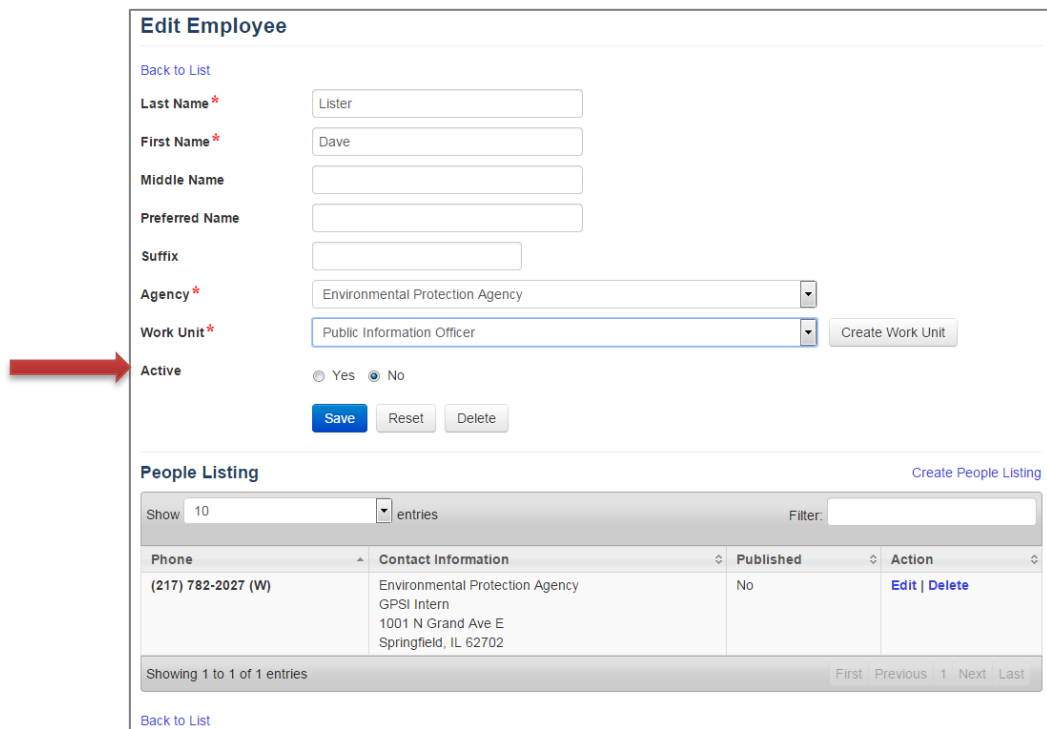
Save   Reset   Delete

People Listing

Create People Listing

Show 10 ▼ entries   Filter:

Phone ▲	Contact Information ⇕	Published ⇕	Action ⇕
(111) 111-1111 (C)	Central Management Services BCCS-Enterprise Applications-Applications	No	Edit | Delete
(217) 785-1450 (W)	Central Management Services BCCS-Enterprise Applications-Applications 300 Lb	Yes	Edit | Delete

5. If more than one Work Phone and/or Address is/are needed, add multiple listings by clicking on "Create People Listing" button. The following pop-up will appear:

Create People Listing   ×

Phone Number*   **Phone Extension**

Phone Type*

Select a phone type ▼

Address

Email Address

Email Type

Select a email type ▼

Published

○ Yes ● No

Save   Close

6. Enter the additional telephone number and extension. Select additional Address from the drop-down list.
7. Click "Save" button. The following screen will appear to confirm the saved People Record:

B. Edit People

1. Click the "Maintain Employee" link on the menu.

2. The following screen will appear:

Maintain Employee

Each agency establishes its own publication policy - i.e. which staff may (or may not) have their contact information published in the SOI Directory. The designated Coordinator controls his/her agency's published information.

Coordinators may Add/Create People records, Edit People Records, Inactivate People Records, and Re-Activate People records. The Application also permits global changes for large groups of staff.

Agency	All agencies
Last Name	
First Name	

Search   Reset

Select People Record for editing using one of the following methods:
- Search by first or last name (type name and click "Search People" button), or;
- Click on first letter of either Last Name, or;
- Click on first letter of First Name, or;
- Select a Work Unit in drop-down box, then click "Select People from Work Unit" button.

The following search result screen will appear:

Maintain Employee

Each agency establishes its own publication policy - i.e. which staff may (or may not) have their contact information published in the SOI Directory. The designated Coordinator controls his/her agency's published information.

Coordinators may Add/Create People records, Edit People Records, Inactivate People Records, and Re-Activate People records. The Application also permits global changes for large groups of staff.

Agency	All agencies
Last Name	e
First Name	h

Search   Reset

Search Results   Create Employee

Show 10 entries   Filter:

Employee Name	Agency	Work Unit	Status	Action
Ellison, Harlan	Human Services	Rehab Springfield Field Office	Active	Edit | Delete
Everett, Harry	Emergency Management Agency	Radiochemistry	Inactive	Edit | Delete
Everett, Mary	Criminal Justice Information Authority	Executive Director	Active	Edit | Delete
Ellison, Larry	Emergency Management Agency	Radiochemistry	Inactive	Edit | Delete
Eagle, Jane	Healthcare and Family Services	Division of Child Support Services	Active	Edit | Delete
Eager, Dave	Transportation	Mat'l & Phy Res	Active	Edit | Delete
Enager, Dave	Transportation	Matl & Phys Research	Active	Edit | Delete
Engle, Oliver	State Lottery	Fiscal Operations	Active	Edit | Delete
Ensign, Slade	Gaming Board	Illinois Gaming Board	Active	Edit | Delete
Esstein, Kenshin	Human Services	F&CS Kane County Benefits Office	Active	Edit | Delete

Showing 1 to 10 of 12 entries   First Previous 1 2 Next Last

3. Click desired name to open People Record. The following entry screen will appear:

4. **Edit Personal Information:**
   - First Name and Last Name are required fields.
   - Upper and/or lower case can be used.
   - Select Work Unit from the drop-down box.
   - Edit e-mail if desired and check box **only** if it should be published.
   - Edit Cell Phone number and check box **only** if it should be published.

   If person IS NOT to be included in People Listings, but will be referenced as part of a Business Listing, click "Save" button. (The Work Phone and Address for the Business listing are entered on a separate screen.)
5. Edit Work Phone(s) and Address(es):
   If "person" IS to be included in the People Listings, the Work Phone and Address are required.
   - Edit Work Phone (10 digit number = XXXXXXXXXX). If the work phone is from a foreign country, click ⊞ and select the country.
   - Edit extension number.
   - Select Address from drop-down menu.
6. System default checks the box to publish the People Record. To avoid publication, the "Publish Record" box must be un-checked.
7. If more than one Work Phone and/or Address is/are needed, add multiple listings by clicking on "Create People Listing" button. The following pop-up will appear:

8. Enter the additional telephone number and extension. Select additional Address from the drop-down list.
9. Click "Save" button. The following screen will appear to confirm the edited People Record was saved:

C. Activate or Inactivate People

1. Select an employee to active/deactivate and go to the Edit Employee screen :

D. Delete People

1. Select an employee to delete and go to the Edit Employee screen :

2. Click on the "Delete" link to be delete. The following pop-up confirmation will appear:

Please Confirm: press 'OK' to delete this employee; press 'Cancel' to return to the list

Cancel   OK

Click "OK."

3. The following screen will appear to confirm the record deletion:

Maintain Employee

Delete is successful.

Each agency establishes its own publication policy - i.e. which staff may (or may not) have their contact information The designated Coordinator controls his/her agency's published information.

Coordinators may Add/Create People records, Edit People Records, Inactivate People Records, and Re-Activate Pe permits global changes for large groups of staff.

Agency   All agencies   ▼

~~Last Name~~   white

4. To delete *only* phone number and/or contact information. Check "Delete" link(s) adjacent to the desired listing(s), select an employee and go to the "Edit Employee" page:

Edit Employee

Back to List

Last Name*	Wayne
First Name*	John
Middle Name	
Preferred Name	
Suffix	
Working Title	
Agency*	Transportation ▼
Work Unit*	Information Process ▼ Create Work Unit
Active	⦿ Yes ○ No

Save   Reset   Delete

People Listing   Create People Listing

Show 10 ▼ entries   Filter: [   ]

Phone	Contact Information	Published	Action
(217) 785-5018 (W)	Transportation Information Process 2300 S Dirksen Pkwy Hanley Bldg - RM 019 Springfield, IL 62764	No	Edit |

Showing 1 to 1 of 1 entries   First Previous 1 Next Last

5. Click "Delete" link to delete only the selected Telephone and Address information. The following screen will appear to confirm the altered record was saved:

IV. Business Listings and Headings

SOI Directory Business Listings are similar to business listings in public telephone directories. They contain important office and work section telephone information arranged somewhat by the agency's organizational structure. Highlighted headings and proper indentation establish bureaus, departments, and work sections.

Business Listings are more complex than People Records so adding/updating listings will need several extra seconds of processing time.

A. Business Categories (Top Level Headings)

Business Categories are system defined. The four categories provide the general structure of all agencies' Business Listings. In viewing the SOI Directory, Business Categories are shaded and appear centered on the page. An agency may use one, two, three, or all four Business Categories. These headings do NOT contain any person's name, address, or telephone number. To maintain consistency throughout the SOI Directory, they appear in this order:

Under each Category, additional Lower Level Headings and Business Listings may be created. To visually distinguish between headings and names of large business units, the Application allows for shading and the addition of blank lines to separate text. Four levels of indentation also establish bureaus, departments, and work sections. **As is standard within telephone directory publications, listings under each category should be alphabetized.**

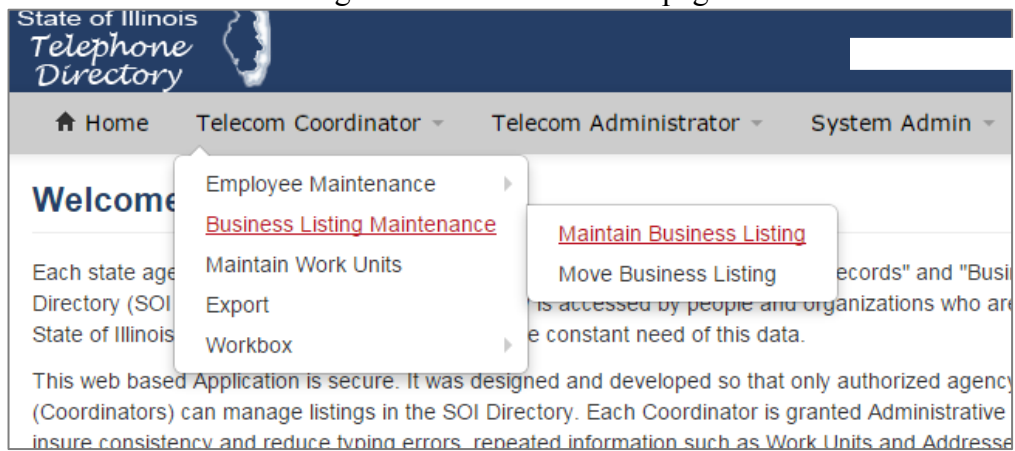## B. Add Lower Level Headings and Business Listings

Subsequent Lower Level Headings and Business Listings:

a. Permit adding a "blank" line between entries.
b. Permit address, telephone, and descriptions as optional information.
c. Permit shading. (The name of a bureau or department can be shaded.)
d. Permit indenting to show order and reporting structure.
e. Should be alphabetized within each heading. Remember, this is a phone book, *NOT* an organizational chart! Furthermore, users are accustomed to alphabetization within sections.

Lower Level Headings and Business Listings are indented to visually illustrate relationships between entries. Example:

SPRINGFIELD	(Top Level Heading)
Test Department	(entered as sub-item under Springfield)
Executive Director	(entered as sub-item under Test Department)
Administrative Assistant	(entered as sub-item under Test Department)
Team A	(entered as sub-item under Test Department)
Group 1	(entered as sub-item under Team A)
Project 2	(entered as sub-item under Team A)
Research	(entered as sub-item under Team A)
Section	(entered as sub-item under Team A)
Basic Tests	(entered as sub-item under Section)
Group Plans	(entered as sub-item under Section)
New Developments	(entered as sub-item under Section)
Work Unit B	(entered as sub-item under Test Department)
Work Department	(entered as sub-item under Springfield)
Office Assistant	(entered as sub-item under Work Department)
Work Unit C	(entered as sub-item under Work Department)
Export Process Staff	(entered as sub-item under Work Unit C)
Import Process Staff	(entered as sub-item under Work Unit C)
Archives	(entered as sub-item under Export Process Staff)
Copy Services	(entered as sub-item under Export Process Staff)
Electronic Services	(entered as sub-item under Copy Services)
Manual Printing	(entered as sub-item under Copy Services)
Work Unit D	(entered as sub-item under Work Department)

1. Click "Business Listing" link on left side of the page.

2. The following screen will appear:

The view of Business Listings is filtered by the Business Category (Top Level Headings) to minimize the need for scrolling.

3. Select the Business Category to be displayed. The following screen will appear: (Example displays "Springfield.")

Maintain Business Listing

Each agency establishes its own publication policy - i.e. which staff may (or may not) have information published in the SOI Business Listing. The designated Coordinator controls his/her agency's published information.

Coordinators may Add/Create Business Listing records, Edit Business Listing records, Publish Business Listing records, and Un-Publish Business Listing records.

Agency* | Central Management Services ▼

Business Category* | SPRINGFIELD ▼

[Search] [Reset]

Search Results   📄 Save/Print

Show [10 ▼] entries   Filter: [_____]

Description	Contact Information	Published	Action
[blank line]		True	Edit | Delete | Create
Office of The Director		True	Edit | Delete | Create
Director	Tyrrell, Tom 401 S Spring Stratton Bldg - RM 715 Springfield, IL 62706-4100 (217) 782-2141	True	Edit | Delete | Create
Special Assistant	Armstrong, Marcia 401 S Spring Stratton Bldg - RM 715 Springfield, IL 62706-4100 (217) 782-2141	True	Edit | Delete | Create
Administrative Assistant	Mason, Anna	True	Edit | Delete | Create

4. Identify the heading/listing under which the new entry should be made. Click "Create" link on same row as the item that you want to add it under. The following pop-up will appear:

Create Business Listing   ✕

Blank Line   **Shaded Line**   **Indent**
○ Yes ◉ No   ○ Yes ◉ No   [1 ▼]

Description
[_____]

Position After
[Administrative Assistant ▼]

Person
[_____]

Address
[_____]

Country Code
[USA/Canada ▼]

Phone Number   **Phone Extension**
[_____]   [_____]

Phone Type
[Select a phone type ▼]

Published
○ Yes ◉ No

[Save] [Close]

5. Enter Business Listing information:

a. **Blank Line**: If only a blank line is needed for visual clarity, check "Yes" for "Blank Line", leaving *all* remaining fields empty.

b. **Shaded Line**: If this entry is a new bureau, department, or section Heading, shading the entry can provide visual clarity. If so, select the "Yes" button.

c. **Indent**: Select the indentation level of this Business Listing from the drop-down list.

d. **Description**: Enter description/listing for this Business Listing.

e. **Position After**: Select desired Position for the new Heading/Listing using the drop-down box. Drop-down will identify all possible insertion locations within this indention level.

f. **Person**: If needed, select and include an individual's name in the Business Listing. Choose from People Records already established in the drop-down box. Leave the field blank if no name is associated with the Business Listing.

g. **Address**: If needed, type and select an address from the autocomplete drop-down list. Leave the field blank if no address is associated with the Business Listing (i.e. headings only).

h. **Country Code**: Enter a foreign telephone number by selecting appropriate country name from the drop-down list.

i. **Telephone**: Enter 10 digit phone number (XXXXXXXXXX). Leave the field blank if this entry is a heading only with no associated Phone number.

j. **Extension**: Enter any extension associated with this telephone number.

k. **Phone Type**: If a telephone number is entered for this business listing, select a phone type from the drop-down list.

l. **Publish**: Check "Yes" if this Business Listing is viewable by the public.

m. Click "Save Item" button. System returns to the main "Business Listing" screen now displaying the new entry.

Business Listing Tips:

If the agency provides a specific service or product to others, it is important to include a Business Listing that identifies that service or product by name so that the public and State DA Operators can identify the contact information.

EXAMPLE: Business Listing for State Agency X:

Chicago

Production and Field Services   111 Main Street, Hamilton Building, Chicago 60601   312-555-6666

Problem: Agency X produces maps of the State Capitol Complex and provides them free to anyone who requests a copy. The Production and Field Services work unit produces and distributes these maps. How will Directory users and State DA Operators know this?

Solution: Add an additional business listing or re-name the previous entry as:

Capitol Complex Maps   111 Main Street, Hamilton Building, Chicago 60601   312-555-6666

C. Edit Lower Level Headings and Business Listings

1. Click "Edit" link on the Business Listing to be modified.

2. The following pop-up will appear:

Make needed changes in the Business Listing.

3. Click "Save" button. System returns to the main "Business Listing" screen where saved data can be reviewed.

D. Re-Organize/Re-Order Lower Level Headings and Business Listings

1. Click "Business Listing" link on left side of the page.

2. The following screen will appear:

3. Click "Edit" link on the right-hand side of the screen.

4. Select the desired Top Level Heading where re-organization will occur. The following screen will appear:
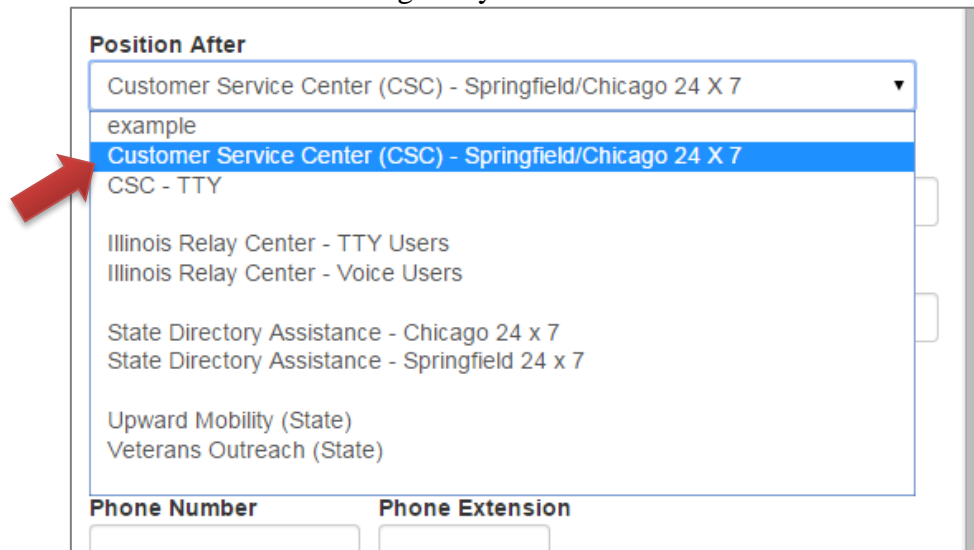
5. Select the Business Listing that you want it to be listed after:
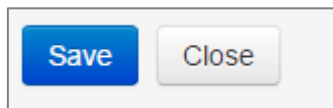
6. Click on the "Save" button to save the Business Listing's new position on the list.

7. The following pop-up message will appear; note the changed position order of the two Business Listings:

Note: When a Heading/Business Listing (and its indented sub-entries) is/are moved in this manner, they are positioned at the BOTTOM of the new *parent* Heading location. If the Listings need to be re-positioned within that category to maintain correct alphabetization, use the edit function. See **Edit Business Listing,** Section IV, C.

E. Delete Lower Level Headings and Business Listings

1. Click "Maintain Business Listing" link on the menu.

2. The following Business Listing screen will appear:

4. Click "Delete" link corresponding to the desired Business Listing. The following pop-up will appear:

5. Click "OK" button and it returns to the "Maintain Business Listing" screen to view and confirm the listing(s) was/were removed.

V. Export

1. Select "Export" link on the menu.

2. The following screen will appear with the default selections:

Click on the "Export" button to download either "People Listing" or "Business Listing" as an Excel file in .csv format.

VI. Workbox

A. View Audit Log

Log activity is provided to track administrative changes in the SOI Directory. During the edit process, screens identify the date a record was added, deleted, or last updated and the person responsible for the change. Also, log activity is archived and can be printed based on filter criteria.

1. Select "View Audit Log" link on the menu.

2. The following screen will appear with the default selections:

3. Click "Search." The following screen will appear:

B. **People Listing Errors**

1. Select "People Listing Errors" link on the menu.

2. The following screen will appear:

3. Select an Agency or leave it as is and click on The following screen will appear:

C. View Person Duplicates

1. Select "View Person Duplicates" link on the menu.

2. The following screen will appear:

4. Select an Agency or leave it as is and click on The following screen will appear:

VII. Telecom Administrator

A. Add Address

The Address screens and the view of the actual on-line Directory provide search results displayed in numeric order by street address, followed by building name.

1. Click on "Maintain Address" link on the menu.

2. The following screen will appear:

3. Confirm that the Address does not already exist. Manually check for discrepancies – i.e. the same physical Address has two separate entries in this example. Coordinators should consolidate and clean-up such entries.

4. Click on "Create Address" link. The following screen will appear:

5. Enter the information and click "Save" button.

Note: Street 1, City, Postal Code and Country are mandatory fields. Building Names should be used to identify known state facilities – use Building Name field. P.O. Box Addresses should be entered in "Street 2" or "Street 3" fields. Since implementation of 911, all locations should have a street address. Enter the Room, Suite, and/or Floor information. Always designate Room, Floor, or Suite before the numeric information. The field can be used to enter both a floor and a room:

> FL 8, Room 845
> Floor 8, Ste. 845
> Suite 15-509

The following confirmation screen will appear:

B. Edit Address

1. Click "Edit" link on right side of the page.

2. The following screen will appear:

3. Make change(s) to the form fields.

   Note: Street 1, City, Zip and Country are mandatory fields. Building Names should be used to identify known state facilities. P.O. Box Addresses should be entered in "Street 2" or "Street 3" fields. Enter the Room, Suite, and/or Floor

information. Always designate Room, Floor, or Suite before the numeric information. The field can be used to enter both a floor and a room. Click "Change Address." Since implementation of 911 addresses, all locations should have a street address.

The following confirmation screen will appear:

C. Delete Address

1. Click "Maintain Address" link on the menu.

2. The following screen will appear:

Use filters to narrow the search.

3. Click the Delete link of the Address to be deleted. The following confirmation screen will be displayed:

D. Quick Search

1. Click "Maintain Quick Search" link on the menu.

2. Click "Maintain Quick Search" link on the menu.

a. *Create Quick Search*
   i. Click "Create Quick Search" link on right side of the page.

ii.   The following screen will appear:

Enter the data and click on the "Save" button.

iii.   The following confirmation information will be displayed:

b. *Edit Quick Search*
   i.   Click "Edit" link on right side of the page.

Maintain Quick Search

Quick Search List   Create Quick Search

Show 10 ▼ entries   Filter: [   ]

Name	Phone Number	Responsibility	Message	Action
_test	+86 (654) 654-6546	test	test	Edit | Delete
Accounting Revenue (SOS)	(217) 782-6821	General Information	or 782-6823	Edit | Delete
Administrative Hearings (SOS)	(217) 557-2597	General Inquiries		Edit | Delete

ii.   The following screen will appear:

Edit Quick Search

Name *	_test
Responsibility	test
Message	test
Address	1209 Wenthe Dr, Effingham, IL 62401-1697
Country Code *	USA/Canada ▼
Phone Number *	(866) 546-5465
Phone Extension	123
Phone Type *	Work Phone ▼
Agency	Aging ▼

Save   Reset

Edit the data and click on the "Save" button.

iv.   The following confirmation information will be displayed:

Maintain Quick Search

Save is successful.   ✕

Quick Search List   Create Quick Search

Show 10 ▼ entries   Filter: [   ]

Name	Phone Number	Responsibility	Message	Action
_test	(866) 546-5465	test	test	Edit | Delete

c. *Delete Quick Search*
    i.   Click "Delete" link on right side of the page.

Maintain Quick Search

Quick Search List   Create Quick Search

Show 10 ▼ entries   Filter:

Name	Phone Number	Responsibility	Message	Action
_test	+86 (654) 654-6546	test	test	**Edit	Delete**
Accounting Revenue (SOS)	(217) 782-6821	General Information	or 782-6823	**Edit	Delete**
Administrative Hearings (SOS)	(217) 557-2597	General Inquiries		**Edit	Delete**

ii.   The following pop-up appears:

Are you sure you want to delete this Quick Search record?

Cancel   **OK**

Click the "Ok" button to delete the record.

iii.   The following confirmation screen will be displayed:

Maintain Quick Search

Delete is successful.

Quick Search List

Show 10 ▼ entries

VII.   Additional Information and Contacts

- **Portal to SOI Directory Administrative Maintenance**
  Login with your trusted AD account: https://DoITsecureqa.illinois.gov/Telephone/
  Login with your public account https://DoITpublicqa.illinois.gov/Telephone/

Appointment of Telecommunications Coordinators	DOIT Customer Service Center 120 West Jefferson – 2^{n}Floor Springfield, IL 62702 800-366-8768 217-524-4784 [in Springfield]
Digital ID Issues	DOIT Customer Service Center 800-366-8768 Option 1-IT Help Desk Sub-Option 3
Log-on Issues	DOIT Web Services 120 West Jefferson Springfield, IL 62702 webservices@illinois.gov
Telecommunications Bulletins and Information	www.DoIT.illinois.gov

Training – DOIT no longer offers training classes on the SOI Directory. Departing agency Coordinators should train their replacements as part of the transition of duties. This User Guide contains complete instructions for adding, editing, and deleting Business Listings as well as People Listings. This is a self-help guide for all Coordinators in maintaining Directory listings.

Important Notes to Remember:

- **Agency Policy**: Each agency must establish its own policy regarding which employees should and should not be included in the State Telephone Directory.

- **Timing**: Changes made in the Directory are instantaneously seen in the active, published State Directory available on the State's homepage. Don't panic – any mistake can just as quickly be corrected!

- **First Things First:**
    1. Create/add Work Units – and keep Work Units updated
    2. Create new Addresses - and keep Addresses updated
    3. Maintain People Listings
    4. Maintain Business Listings

    - ✓ This the correct order of things. Coordinators must update Work Units and Addresses fist. These sections become tables that create drop-down menu boxes used in completing People Records and Business Listings. In creating a People Record or Business Listing, the address cannot be typed in the field ….. the address must be selected from the drop-down of address options. Thus, Coordinators must first add a new address into the address table before that address can be included as a part of any Directory record.
    - ✓ The same thing applies for Work Units. Add a new Work Unit into the tables. Then, when creating a People Listing, the Work Unit field is completed by selecting from the available drop-down list.
    - ✓ When creating a Business Listing, an individual's name cannot be typed in the field – a name can only be included in a Business Listing if it was first created as a People Listing and is in the drop-down list of agency staff names.

- **Printouts.** Coordinators can do a screen print of any page they are working on. However, the best way to see an actual copy of all agency entries is to log on to the published State of Illinois Telephone Directory available on the State's home page. Click on the link to the SOI Directory. In the left-hand navigation bar, click on "Printable Versions." Click to print the Business Listings of a selected agency, or click to print the People Listings of a selected agency.

- **What does "Publish" mean:** When creating a People Record, the system default is set to "Publish." This means the individual's name is available in the alphabetical search done on the published SOI Directory available on the State's home page. If the State of Illinois Directory Assistance Operators receives a call asking for contact information for that individual, they can find the name, address and phone. If you "un-check" the Publish box (located in the People Listing just below the name/address section on the page), the individual's name/address/phone cannot be found in any alphabetical search done on the published SOI Directory available on the State's home page. However, the name is available for inclusion in a Business Listing.

- **Deleting a People Record.** Coordinators cannot delete a People Record from the Directory if the name is included in a Business Listing.

    - o The Business Listing cannot be edited under the People Record.
    - o Open the Business Listings and make changes from that screen.
    - o Remove the name from the Business Listing(s). (Leave the name field blank or select another name.) Save.
    - o Re-open the People Record. The "delete" button will be active and the record can be deleted.

- **Addresses**: Addresses appear in numeric order.
    - o To simplify your work, *avoid* address duplication.
      The following are all the **same** address:
          100 West Main Street
          100 W Main Street
          100 West Main St
          100 West Main

- o An Address <u>cannot</u> be deleted if it is used in any People Record and/or a Business Listing. Coordinators will need to do a Move Address change, or correct the People Record or Business Listing prior to deleting any specific Address. Once the Address list shows there are no People Records or Business Listings associated with the Address, the "Delete" link will be displayed and allow the Address record to be purged.
- o Let "Move Address" functionality do the work for you. Use this feature to move a large group of People Listings and/or Business Listings from one Address to another.
- o Print a list of all staff at a given address: Pretend to do a move address change. Open Addresses. Click to do a Move Address change for the desired address – do a screen print of the page that open to identify all People Records and Business Listings associated with the address.

- **Work Units**: A Work Unit cannot be deleted if there are People Listings associated to it. Edit the People Listings to change the Work Unit. Then return to the Work Unit screen and the "Delete" link should be active and allow deletion.

- **Business Listings**: Business Listings in the SOI Directory are similar to those in public phone book. They should *not* be a repeat of the agency's organization chart – but contain common names of the agency's divisions and services. While the agency's internal staff will know what work is performed by the "Development Services Team" – the State DA Operators, general public and other state agency employees would not. Identify work groups by what function they perform or service they provide.